eConcern Online

User's Manual

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INTRODUCTION

This manual is basically created for the navigation within the Online eConcern and maximizes its full potential. This instruction manual provides information about the features and the step-by-step procedures for the authorized user to submit concern or inquiries to CMIT and be received by helpdesk Officer.

All means to provide good service and meet clients need.

General Information

eConcern ONLINE is web based application and can be access anywhere. Provided with an internet connection. Best to be viewed with Google Chrome or Mozilla Firefox Browser. Apache & Mysql driven website.

Here's the link: http://www.it.cardbankph.com (ctrl + click to follow link)

Website is hosted in-house @ CMIT office in San Pablo City Ph. In cases you can't access the link, you call directly at (+6349) 562. 4309.

Ready? Let's get started.

Getting Started

Opening your web browser is the first thing to do. Then go to WWW.IT.CARDBANKPH.COM. You must see this kind of page. Figure 1.0

Figure 1.0

Figure 1.1

On the top menu is the link for eConcern page. Click econcern as seen on figure 1.1

After clicking the eConcern link, a login form at the right side and a "Create Account" button is displayed. You need to be registered upon accessing Online eConcern. Only one account per area is advised. If it your first time here, then you need to be registered first. Let me show you how.

Start by clicking the *"Create your Account"* button. Then you will be directed to register page. Figure 1.2

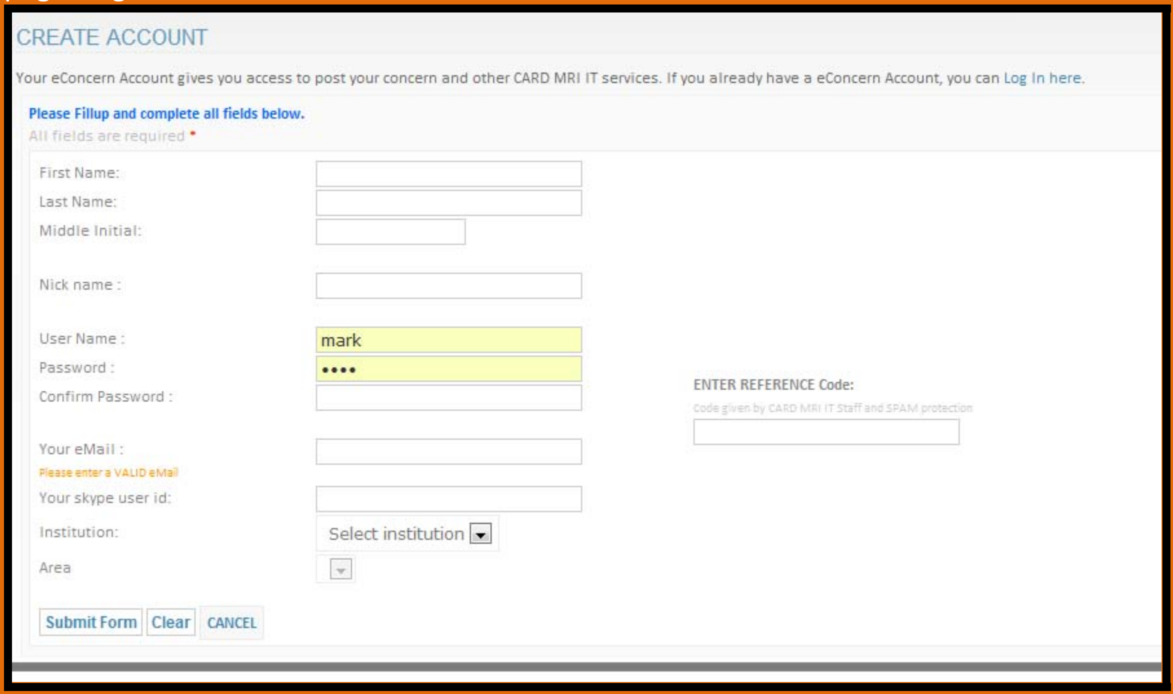


Figure 1.2

CREATING YOUR ACCOUNT

Creating account basically is the key to access the website. But don't worry. This is as easy as filling up the blanks with the answers you already know, even your fellow.

So here are the fields you need to fill up, as illustrated in Figure 1.2
Example:

First name :	Matt Andre	Input your full name at each designated field, but place only middle initial. Avoid adding symbols for this result to incomplete registration.
Last name:	Paris	
Middle Initial:	N.	
Nickname:	MATT	Input your Short Nickname. This will be used in chat or as simply by greeting you
Username:	matt123	One of the important thing, your key. Choose your desired username and password. No minimum required for password but username must be unique. If other had already the same username as you, then choose another one.
Password:	******	
Confirm Password:	******	
Your email:	matt@yahoo.com	Other info is needed. In case we need to contact you in other means.
Your skype id:	matt	
Institution:	CARD BANK	Select from Institution first, then look for your designated area below.
Area:	San Pablo	
Reference Code:	1234567890	And oops, here's the another thing to have. Don't forget to ask HELPDESK for the REFERENCE CODE. Reference code will be given differently for each institution.

After filling up these fields, Click Submit and you will be directed to login page. Else, then you might need to check the fields to correct some.
> Click "CANCEL" to return to login page. Recommended only if you are registered.
> Click "CLEAR" to reset the form.

NOW LOG IN with your account we create previously. Figure 1.3

Figure 1.3

Online eCONCERN Environment

After logging in, you will be directed to your home page of eConcern. This consist of a User Dashboar , Links to your list of concerns group by its status, a link your account setting, and chat to other user. Figure 2.0

Notifications:

List of concern grouped by its status:

DASHBOARD for concern count.

Quick view of concern count and profile picture

Account setting and logout link

Chat groups. Orange border indicates that they are online

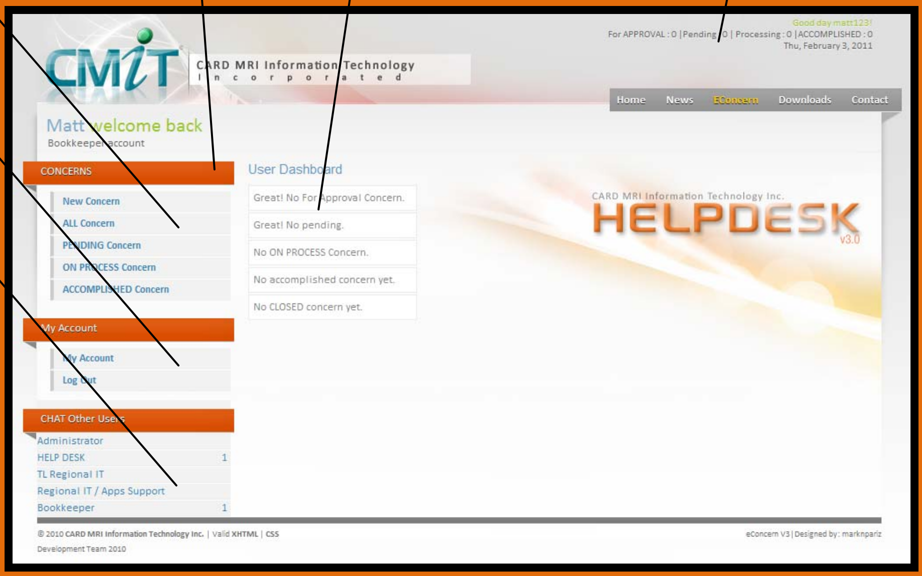


Figure 2.0

But before you proceed on creating your first concern, you need to update first your signatory . To do this, go to My Account > Edit Profile and Update your Signatory and his/her position. Figure 2.1

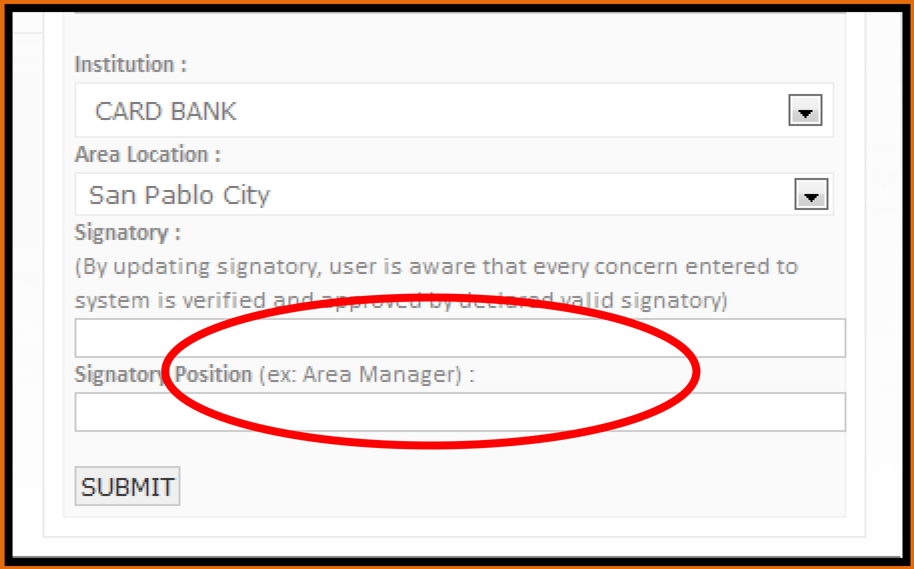


Figure 2.1

CREATING Concern

Creating concern is easy. A "New Concern" link at the left side menu direct you three different online forms separated by tabs.

As concerned, I must first identify which category is my concern. Is it about client, reports, account application and other issues related to the system or operations.

Figure 2.2

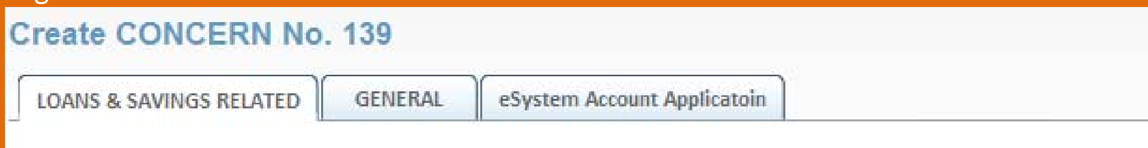


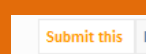
Figure 2.2

- LOANS & SAVING RELATED
  - Use this form when you concern is related to client accounts like loan and savings.
- General
  - Use this form when you concern is related mostly like reports or errors
  - With its capability in attaching files to concern limited to 1mb per attachment x5.
- eSystem Account Application
  - Use this form only when someone from your area apply for a user account in eSystem.

Upon creating concern, you must be aware of the guidelines and procedures implemented.

Always Complete the required fields. Required fields are mark with asterisk(*).

mitting submit form to post your concern. But after you post your concern, you must click then helpdesk can

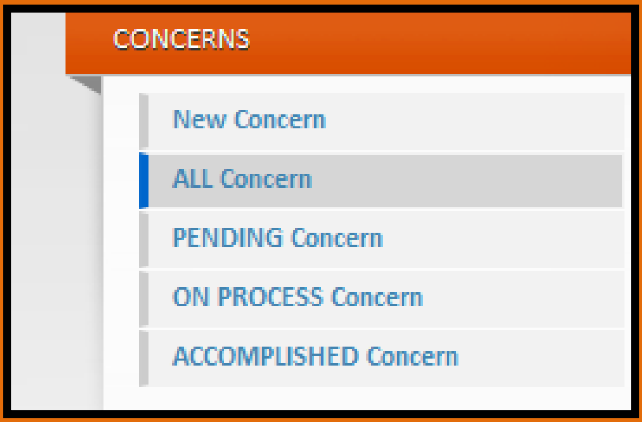


view your concern. Its purpose is make the user resubmitting it to review his/her concern before finally submitting the concern. Plus, you can't edit submitted concern. You can only edit them or add more attachment as long as its status is "Approval".

To edit your concern, click details. Then you will find "Edit Concern Button". On the other hand, you can cancel your concern if you need it.

After Submitting your concern, it will notify us and notify you again at the time we received it. That's all. You already done your first concern.

FLOW of CONCERN and Status



Concern Status is important. It indicates how your concern is going. At first, when you create a concern and post it, your concern status is ''APPROVAL' means, it requires a review before submitting it to Helpdesk. If you need to add more attachment, you can upload 5 more attachment to the concern entry or edit some information regarding to your concern as long as its status is 'APPROVAL'. Then if you are decided, click 'submit' then your concern status will be "PENDING". By this status, we are able to see your concern and confirm it. As we resolve your concern, and putting solutions to it, we change its status to "ON PROCESS". After we implement solutions to your concern, we change its status to "ACCOMPLISHED", meaning we resolve your concern.
After we accomplished your concern, we will ask you to closed your concern by clicking "CLOSED". By this means, we consider your concern done.

That's it! Hope you feel comfortable using our HELPDESK module to bring better and efficient service to you.